

# Data Reliability Assessment Tool: Electric Baseload Expenditures

## Overall Assessment of Data Reliability

The Overall Reliability Assessment includes screeners for each assessment to help you determine where it looks like your data are reliable and where you might want to dig deeper using one of the in-depth assessments. We recommend completing the Overall Assessment before moving on to the other assessments.

Here is what you will need:

### Screener #1 – Are the average annual electric bills you reported for each fuel type close to the annual electric bills we would expect in your state?

#### 1) Average Annual Electric Bill Among LIHEAP Households by Fuel Type:

- **Where:** If you are evaluating a fiscal year for which Performance Data have already been processed, then this information will be auto populated into the tool from the Data Warehouse. Otherwise, you will need to enter the data from *Section V, Part B, Line 5* of your Performance Data Form.
- **What:** The *average annual electric bill* for LIHEAP-assisted households by main heating fuel:
  - Natural Gas Primary Heat
  - Fuel Oil Primary Heat
  - Propane Primary Heat

### Screener #2A – Do you have enough electric vendors supplying data?

#### 1) Number of Electric Vendors Serving LIHEAP-Assisted Households by Vendor Type:

- **Where:** Request this information from your IT department.
- **What:** A count of the number of electric vendors that receive LIHEAP benefits on behalf of your LIHEAP-assisted households. If possible, sort the vendors into the following categories:
  - Investor-Owned Utilities (IOUs)
  - Public Municipal Utilities
  - Rural Electric Cooperatives
  - Unknown

#### 2) Number of Vendors to Whom Your Office Sent a Data Request.

- **Where:** Request this information from your IT department.
- **What:** A count of the number of electric vendors from whom your office requested electric baseload expenditure data for LIHEAP-assisted households. If possible, sort the vendors into the following categories:
  - Investor-Owned Utilities (IOUs)
  - Public Municipal Utilities
  - Rural Electric Cooperatives
  - Unknown

**3) Number of Vendors Reporting Data for LIHEAP Households:**

- **Where:** Request this information from your IT department.
- **What:** A count of the number of vendors that complied with your request and reported electric billing data back to you. If possible, sort the vendors into the following categories:
  - Investor-Owned Utilities (IOUs)
  - Public Municipal Utilities
  - Rural Electric Cooperatives
  - Unknown
- **Note:** For each utility type, the numbers entered here should be *less than or equal to* the corresponding number in data item #2 immediately above.

**Screener #2B – Do you have data for enough LIHEAP Households?****1) Number of Households by Main Heating Fuel:**

- **Where:** If you are evaluating a fiscal year for which Performance Measures Data have already been processed, then this information will be *auto populated* into the tool from the Data Warehouse, otherwise you will need to enter the data from *Section V, Part A of your Performance Data Form*.
- **What:** A count of the number of LIHEAP-assisted households by main heating fuel:
  - Electric Heat Households
  - Natural Gas Households
  - Fuel Oil Households
  - Propane Households

**2) Number of Households with COMPLETE Electric Baseload Data Collected by Main Heating Fuel:**

- **Where:** Request this information from your IT department or data staff.
- **What:** A count of the number households with each of the following main heating fuel types for whom you received 12 consecutive months of electric baseload billing data, *regardless* of whether or not you also received 12 consecutive months of billing data for their main heating fuel.
  - Electric Main Heat Households
  - Natural Gas Main Heat Households
  - Fuel Oil Main Heat Households
  - Propane Main Heat Households

**Screener #3A – Do you have an electric vendor and account number on file for a large percentage of your assisted households?****1) Number of Households by Main Heating Fuel:**

- **Where:** If you are evaluating a fiscal year for which Performance Measures Data have already been processed, then this information will be *auto populated* into the tool from the Data Warehouse, otherwise you will need to enter the data from *Section V, Part A of your Performance Data Form*.
- **What:** A count of the number of LIHEAP-assisted households by main heating fuel:
  - Electric Heat Households
  - Natural Gas Households

- Fuel Oil Households
- Propane Households

## 2) Number of Households with an Electric Vendor and Account Number on File by Main Heating Fuel:

- **Where:** Request this information from your IT department.
- **What:** A count of the number of households who have an electric vendor and account number, or other unique identifier used for matching, on file in your data base.
  - Electric Heat Households
  - Natural Gas Households
  - Fuel Oil Households
  - Propane Households
- **Note:** Even households that do not heat with electricity should have an electric vendor and account number listed on file and therefore should be included in this count.

## Screener #3B – Are you having trouble collecting *both* main heating fuel *and* electric baseload expenditure data?

### 1) Number of Households by Main Heating Fuel:

- **Where:** If you are evaluating a fiscal year for which Performance Measures Data have already been processed, then this information will be *auto populated* into the tool from the Data Warehouse. Otherwise, you will need to enter the data from *Section V, Part A of your Performance Data Form*.
- **What:** A count of the number of LIHEAP-assisted households by main heating fuel.
  - Natural Gas Households
  - Fuel Oil Households
  - Propane Households

### 2) Number of Households with BOTH Electric Baseload Data AND Main Heating Fuel Data Collected by Main Heating Fuel Type:

- **Where:** If you are evaluating a fiscal year for which Performance Measures Data have already been processed, then this information will be *auto populated* into the tool from the Data Warehouse. Otherwise, you will need to enter the data from *Section V, Part B, Line 1 of your Performance Data Form*.
- **What:** A count of the total number of assisted households with each of the following main heating fuel types for whom you have 12 consecutive months of *both* main heating and electric baseload expenditure data.
  - Natural Gas Main Heat Households
  - Fuel Oil Main Heat Households
  - Propane Main Heat Households

### 3) Number of Households with COMPLETE Electric Baseload Data Collected by Main Heating Fuel:

- **Where:** Request this information from your IT department or data staff.
- **What:** A count of the number households with each of the following main heating fuel types for whom you received 12 consecutive months of electric baseload billing data, *regardless* of whether or not you also received 12 consecutive months of billing data for their main heating fuel.

- Natural Gas Main Heat Households
- Fuel Oil Main Heat Households
- Propane Main Heat Households

**4) Number of Households with COMPLETE Main Heating Bill Data Collected by Main Heating Fuel:**

- **Where:** Request this information from your IT department or data staff.
- **What:** A count of the number households with each of the following main heating fuel types for whom you received 12 consecutive months of main heating fuel billing data, *regardless* of whether or not you also received 12 consecutive months of baseload electric billing data.
  - Natural Gas Main Heat Households
  - Fuel Oil Main Heat Households
  - Propane Main Heat Households

**Screener #4 – Do You Have Data Checking and Resolution Procedures?**

You will be asked the following Yes or No questions:

- 1) Do you have checks in place to examine whether agencies are collecting electric vendor information for every client?
- 2) Do you have checks in place to examine whether vendors are supplying complete electric billing information for every client?
- 3) Do you have checks in place to review the data submitted by vendors and identify potential errors?
- 4) Do you have procedures in place for reviewing and resolving findings from your reliability checks?
- 5) Do you have procedures in place for assessing the effectiveness of your checks and making changes when necessary?